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Terms	Documents
6029141.pn.	2

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DATE: Wednesday, February 21, 2007 [Purge Queries](#) [Printable Copy](#) [Create Case](#)

Set	Name	Query	Hit Count	Set Name
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<u>L36</u>		"sima, pradeep".in.	0	<u>L36</u>
<u>L35</u>		"scullard, rand".in.	8	<u>L35</u>
<u>L34</u>		"berg, daniel".in.	68	<u>L34</u>
<u>L33</u>		"beizer, mordechai".in.	9	<u>L33</u>
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<u>L31</u>		'5544317'.pn.	1	<u>L31</u>
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<u>L26</u>	'6131096'.pn.	1	<u>L26</u>
<u>L25</u>	'6167402'.pn.	1	<u>L25</u>
<u>L24</u>	'6324587'.pn.	1	<u>L24</u>
<u>L23</u>	'6324587'.pn.	1	<u>L23</u>
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<u>L20</u>	'5218695'.pn.	1	<u>L20</u>
<u>L19</u>	'5276860'.pn.	1	<u>L19</u>
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<u>L17</u>	'5367698'.pn.	1	<u>L17</u>
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<u>L13</u>	5819295.pn.	2	<u>L13</u>
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<u>L8</u>	5920872.pn.	2	<u>L8</u>
<u>L7</u>	L6 and (placeholder or place with holder or place adj holder or place near holder or place-holder or space or slot)	30	<u>L7</u>
<u>L6</u>	L4 and (workfolder or work with folder or work adj folder or work near folder or work-folder or taskfolder or task adj folder or task near folder or task adj folder)	41	<u>L6</u>
<u>L5</u>	L4 and (workfolder or work with folder or work adj folder or work near folder or work-folder)	39	<u>L5</u>
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<u>L1</u>	5907846.pn.	2	<u>L1</u>

END OF SEARCH HISTORY

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L56 and 715.clas.	2

Database: US Pre-Grant Publication Full-Text Database
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L56	L55	not @py>1997	51	L56
L55	11	and (placeholder or place-holder or slot or place with holder or place adj holder or place near holder)	295	L55
L54	715/501.1		1615	L54
L53	715/1		11	L53
L52	715/500		1352	L52
L51	715/522		287	L51
L50	715/513		3061	L50
L49	715/511		453	L49
L48	707/1		9142	L48
L47	707/10		14255	L47

<u>L46</u>	707/100	9656	<u>L46</u>
<u>L45</u>	707/104.1	7820	<u>L45</u>
<u>L44</u>	707/200	5668	<u>L44</u>
<u>L43</u>	707/206	1479	<u>L43</u>
<u>L42</u>	707/500	1681	<u>L42</u>
<u>L41</u>	707/522	389	<u>L41</u>
<u>L40</u>	707/513	2862	<u>L40</u>
<u>L39</u>	707/511	551	<u>L39</u>
<u>L38</u>	707/204	3489	<u>L38</u>
<u>L37</u>	707.clas.	41217	<u>L37</u>
<u>L36</u>	701.clas.	39992	<u>L36</u>
<u>L35</u>	701/29	2742	<u>L35</u>
<u>L34</u>	701/30	477	<u>L34</u>
<u>L33</u>	704/9	1981	<u>L33</u>
<u>L32</u>	704.clas.	22971	<u>L32</u>
<u>L31</u>	717.clas.	13284	<u>L31</u>
<u>L30</u>	717/3	383	<u>L30</u>
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<u>L22</u>	5388196.pn.	2	<u>L22</u>
<u>L21</u>	6148311.pn.	2	<u>L21</u>
<u>L20</u>	6191786.pn.	2	<u>L20</u>
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DB=USPT; PLUR=YES; OP=OR

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L11 ("5873103")![PN] 1 L11

L10 ("5873103")![URPN] 23 L10

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DB=USPT; PLUR=YES; OP=OR

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L7 ("5819295")![PN] 1 L7

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DB=USPT; PLUR=YES; OP=OR

L5 '5313636'.pn. 1 L5

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L4 L3 and (placeholder or place with holder or place near holder or place adj holder or place-holder or slot) 39 L4

L3 L1 and (contents near node or contents with node or contents adj node) 70 L3

L2 L1 and node 428 L2

L1 (workfolder or work adj folder or work-folder or task adj folder task with folder or task near folder) 1084 L1

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L60: Entry 1 of 2

File: USPT

May 25, 1999

US-PAT-NO: 5907846

DOCUMENT-IDENTIFIER: US 5907846 A

TITLE: Method and system for accessing relational databases using objects

DATE-ISSUED: May 25, 1999

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Berner; Andrew J.	Irving	TX		
Rosenthal; Kathryn A.	Beaconsfield			GB

ASSIGNEE-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY	TYPE CODE
Electronic Data Systems Corporation	Plano	TX			02

APPL-NO: 08/657580 [PALM]

DATE FILED: June 7, 1996

INT-CL-ISSUED: [06] G06F 17/30

INT-CL-CURRENT:

TYPE	IPC	DATE
CIPP	<u>G06 F 17/30</u>	20060101

US-CL-ISSUED: 707/103; 707/104

US-CL-CURRENT: 707/103R; 707/104.1

FIELD-OF-CLASSIFICATION-SEARCH: 395/612, 395/614, 395/604, 395/605, 395/606, 707/101, 707/103, 707/4, 707/5, 707/6, 707/104

See application file for complete search history.

PRIOR-ART-DISCLOSED:

U.S. PATENT DOCUMENTS

PAT-NO	ISSUE-DATE	PATENTEE-NAME	US-CL
<input type="checkbox"/> <u>4930071</u>	May 1990	Tou et al.	364/300
<input type="checkbox"/> <u>5133075</u>	July 1992	Risch	395/800
<input type="checkbox"/> <u>5212787</u>	May 1993	Baker et al.	395/600

<input type="checkbox"/>	<u>5235701</u>	August 1993	Ohler et al.	395/600
<input type="checkbox"/>	<u>5291583</u>	March 1994	Bapat	395/500
<input type="checkbox"/>	<u>5295256</u>	March 1994	Bapat	395/504
<input type="checkbox"/>	<u>5297279</u>	March 1994	Bannon et al.	395/600
<input type="checkbox"/>	<u>5317742</u>	May 1994	Bapat	395/714
<input type="checkbox"/>	<u>5426780</u>	June 1995	Gerull et al.	395/600
<input type="checkbox"/>	<u>5437027</u>	July 1995	Bannon et al.	395/600
<input type="checkbox"/>	<u>5448727</u>	September 1995	Annevelink	395/612
<input type="checkbox"/>	<u>5455948</u>	October 1995	Poole et al.	395/650
<input type="checkbox"/>	<u>5459860</u>	October 1995	Burnett et al.	395/600
<input type="checkbox"/>	<u>5471629</u>	November 1995	Risch	395/800
<input type="checkbox"/>	<u>5473732</u>	December 1995	Chang	395/77
<input type="checkbox"/>	<u>5499371</u>	March 1996	Henninger et al.	395/710
<input type="checkbox"/>	<u>5504885</u>	April 1996	Alashqur	395/614
<input type="checkbox"/>	<u>5542078</u>	July 1996	Martel et al.	395/614
<input type="checkbox"/>	<u>5548749</u>	August 1996	Kroenke et al.	395/612
<input type="checkbox"/>	<u>5596746</u>	January 1997	Shen et al.	395/612
<input type="checkbox"/>	<u>5615362</u>	March 1997	Jensen et al.	395/614

ART-UNIT: 271

PRIMARY-EXAMINER: Black; Thomas G.

ASSISTANT-EXAMINER: Coby; Frantz

ATTY-AGENT-FIRM: Peterman; Anthony E. Griebenow; L. Joy

ABSTRACT:

An object oriented system for accessing an external relational database from within the object oriented system. The system creates an object and fills it with data values retrieved from the database. References from the object to other objects include pointers to preexisting objects or pointers to placeholder objects. Later retrieves fill in the placeholder objects, eliminating the need to reset the pointers. Caching, utilizing static data and static functions, is performed by each class of objects. Sub-objects are used to create different logical views of data from the database, and query access to the database is provided by a query engine which builds query language statements on demand.

21 Claims, 9 Drawing figures

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L61: Entry 1 of 2

File: USPT

Jul 6, 1999

US-PAT-NO: 5920872

DOCUMENT-IDENTIFIER: US 5920872 A

TITLE: Resource management using resource domains

DATE-ISSUED: July 6, 1999

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Grewell; Patricia	San Mateo	CA		
Hayes; Terry N.	Los Altos	CA		
Bridge; William	Alameda	CA		
Karten; Hans	Ermelo			NL

ASSIGNEE-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY	TYPE CODE
Oracle Corporation	Redwood Shores	CA			02

APPL-NO: 08/672348 [PALM]

DATE FILED: June 25, 1996

INT-CL-ISSUED: [06] G06F 17/30

INT-CL-CURRENT:

TYPE	IPC	DATE
CIPP	<u>G06 F 9/46</u>	20060101

US-CL-ISSUED: 707/202; 707/204, 707/205

US-CL-CURRENT: 707/202; 707/204, 707/205

FIELD-OF-CLASSIFICATION-SEARCH: 395/650, 395/674, 395/726, 707/206, 707/204, 707/202, 707/205

See application file for complete search history.

PRIOR-ART-DISCLOSED:

U.S. PATENT DOCUMENTS

PAT-NO	ISSUE-DATE	PATENTEE-NAME	US-CL
<input type="checkbox"/> <u>5161227</u>	November 1992	Dias et al.	

5403639

April 1995

Belsan et al.

395/650

OTHER PUBLICATIONS

"A distributed lock Manager on fault tolerant MPP" Aldred, M., Gertner, I.; McKellars, S. (Encore Comput. Corp. Marlborough, MA, USA), 1995.

ART-UNIT: 275

PRIMARY-EXAMINER: Toplu; Lucien U.

ASSISTANT-EXAMINER: Nguyen; Hanh

ATTY-AGENT-FIRM: McDermott, Will & Emery

ABSTRACT:

A method and apparatus for managing access to resources is provided. When a process requires access to a resource, the process requests a lock on the resource from a lock manager unit that resides on the same node as the process. If a resource object for the resource does not exist, one is created in the lock manager unit, but not on lock manager units on other nodes. Because each lock manager unit does not have to store all resource objects, and resource objects are only created for resources that are actually used, the overhead of the lock management system is significantly reduced. Resources are grouped in recovery domains. When a lock manager unit that supported a recovery domain fails, the recovery domain is marked invalid. All resources in the recovery domain are considered invalid unless it would have been impossible for a failed instance to have held an exclusive lock on the resource. A snapshot of lock information is made before cleanup is performed on invalid resources. After cleanup, the snapshot is used to determine which resources were cleaned up.

12 Claims, 7 Drawing figures

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Works provides split bars that allow them to divide the window into a series of panes, both side-by-side and top-and-bottom. For example, with the window divided into vertical panes, Clarke can examine on the same screen information about the first person in the membership list as well as the last person.

Clarke arranges the list of 278 members alphabetically by last name, using the Sort command from the Organize menu. This is a good order for a list of members, but when she prepares mailing labels she may wish to organize the list in zip code order.

With the Find Field command (Organize menu), Clarke can quickly locate information from any field. Or with the Match Records command (also in the Organize menu), she can prepare a subset of the membership list.

When she wishes, Clarke can also look for specific information by using record selection rules. To prepare a list of members in the Founder category, she chooses Record Selection (Organize menu). A dialog box appears (Figure 3), and Clarke selects the field, "Member Category" (first column) and "equals" (second column). Then she adds F (for Founder) in Record Comparison Information. When she clicks the Select button, a list of Founder members is generated.

Merging Data

Clarke can also use this database in conjunction with the word processor. Director Ransome wishes to send a letter to Founder members, inviting them to a buffet dinner on campus at the time of Morton Greenberg's talk on April 14.

Ransome gives Clarke the draft of a letter, and Clarke inputs it in Works' word processor, using the ready-made Star Gazer letterhead. So that the letter may be personalized for each member, she adds necessary information from the database, SG 1988, for the inside address and salutation.

With the text of the letter open on the screen, she positions the cursor at the first line of the inside address and selects Prepare to Merge from the Edit menu. A dialog box appears, listing available databases on one side. She selects SG 1988. Immediately, the field names for that database are shown next to it. She selects the field, Title (e.g., Mr., Mrs.), and clicks the Merge button. That element, functioning as a placeholder, appears on the screen as the first part of the address: SG 1988: Title. Skipping a space, she again positions the cursor, selects Prepare to Merge, and selects the field, First Name. She repeats this operation for the remaining elements needed in the inside address and adds the fields for a salutation.

Figure 4 shows a screen display with the placeholders indicating which fields will print and where. Each placeholder includes the database name and field title.

Clarke makes sure the letter is properly positioned on the page and prepares the printer. For this letter she uses the LaserWriter to achieve a near-typeset quality for the correspondence. Instead of selecting the Print command from the File menu, however, she selects Print Merge. The series of letters are printed, each personalized for a Founder member.

Even though it means additional work, Ransome signs each letter individually--in some cases adding her own personal handwritten note.

Mailing Labels

The database can serve other uses, and Clarke employs it so simplify preparation of mailing labels. Clarke has pressure-sensitive mailing labels (each 3-1/2 inches x 1 inch) on continuous pinfeed stock. Works accepts

continuous "1 up" labels for printing on the ImageWriter.

To prepare the labels, Clarke opens a new word processor document. Choosing the Page Format command from the File menu, she sets up a custom-size page, 3 1/2 inches wide by 1 inch deep, with no gaps between pages, and 1/8-inch margins on left and right and top and bottom.

As she did earlier, she sets up a merge document, inserting the placeholders (representing fields from the database) on the custom-size page: on line 1, title, first name, last name; on line 2, address 1; on line 3, address 2; and on line 4, city, state, and zip code. (Most members will not need the two-line address; and when labels are printed, Works very nicely closes up the text so that there is no blank line on the label. This same situation occurs in printing the inside address on the form letter).

Because labels are to be printed on the dot-matrix ImageWriter, she selects an excellent bit-mapped font, Beverly Hills. She checks how the actual data will look through use of the Show Field Data command (Edit menu).

She inserts the continuous-feed label stock in the printer and selects the Print Merge command. After she clicks OK, the ImageWriter marshals its forces and prints the labels one after another according to the order specified--alphabetically, by zip code, etc.

Version 1.1 of Works has improved printing of labels considerably over Version 1. Although there is a delay before printing begins, the actual printing proceeds speedily. Figure 5 shows a group of the labels after printing.

Microsoft Works continues as a versatile, easy-to-master tool, which can answer almost every need most of the time. Without a doubt, Lucy Clarke will find numerous other uses for it in the Jeffrey Star Library.

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Company Names: Microsoft Corp.--Products

Descriptors: Evaluation; Case Study; Public Libraries

SIC Codes: 7372 Prepackaged software

Ticker Symbols: MSFT

011-42884/9 Links

Gale Group Computer DB(TM)

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01242884 **Supplier Number:** 06269692 (This Is The FULL TEXT)

'I've got a little list'. (Computer database program versatility.) (evaluation)

Johnson, Harriet; Johnson, Richard

Small Computers in Libraries , v8 , n3 , p34(5)

March , 1988

Document Type: evaluation

ISSN: 0275-6722

Language: ENGLISH **Record Type:** FULLTEXT; ABSTRACT

Word Count: 1807 **Line Count:** 00136

Abstract: Microsoft Works' communications, word processing, spreadsheet, and database capabilities are used substantially in library database development. The software has features that are essential in a library system that requires a membership tracking database: lists, data merge, and mailing labels. Any one of these databases can be used in conjunction with another database, such as word processing. The label printing process has been improved considerably in the 1.1 version of Microsoft Works. Libraries will undoubtedly find other uses for the integrated programs that make up the package. (Price is not listed)

Text:

"I've Got a Little List"

Were Ko-Ko from Gilbert and Sullivan's Mikado with us today, he would be using a computer database program to compile his list of "society offenders who might well be underground." The wandering minstrel, Nanki-Poo, also could use it to advantage to list his repertoire: "My catalogue is long, thorough every passion ranging." Each could use the program to sort his list in a variety of ways--Nanki-Poo by the kind of ballad and Ko-Ko by the nature of the offense.

If the database were integrated in one package with other programs, they could exploit it even further. Ko-Ko could merge his database of offenders with form letters to notify his victims of their fate. Nanki-Poo could use a spreadsheet to record his concert honoraria and expenses.

Databases in the Library

The Jeffrey Star Library prepares numerous lists and catalogs. For some, it uses database programs on the library Macintoshes.

Earlier articles in this column have discussed several of these: Professional Bibliographic System to prepare bibliographies, Reflex to help organize a book review editors files, Business Filevision to inventory furniture and describe shelving needs in the Reference Room, Double Helix to organize interlibrary loan records, and HyperCard to assemble a list of mystery and suspense novels. Microsoft Works is an integrated program that is also used for preparing lists. It includes four components--word processor, databases, spreadsheet (with charting), and communications.

Microsoft Works

Lucy Clarke, secretary to library director Jane Ransome, uses Microsoft Works to prepare the library annual report. As described in an earlier article in this column, she inputs narrative with the word processor, incorporates statistical tables and charts created with the spreadsheet, and inserts a staff list prepared with the database.

Clarke also finds Works useful in maintaining membership records for the Star Gazers, the library's friends organization.

Creating a Database

To create her basic list of members of the Star Gazers, Lucy Clarke opens a new database document in Works by clicking the database icon. A new form window for a database document (named Untitled) appears on the screen along with a dialog box asking for the first field name.

Earlier, Clarke and Ransome agreed on the following fields for the membership database: Last Name; First Name; Title (e.g., Mr., Mrs.); Member Category; Address 1 (first part); Address 2 (second part if needed); City; State; zip code; and Phone Number. For the fourth field, Member Category, there are four levels of membership in the friends group: Founder (F), Patron (P), Sustaining (S), and Active (A).

Clarke inserts the first field name and clicks the Add Field button. The first field name, Last Name, with an added box for entry data, shows in the form window; and another dialog box appears asking for the name of the new field. She adds the fields one by one and after entering the last field, Phone Number, clicks the Done button.

Using the mouse, Clarke positions the fields in a pleasing manner on the screen and changes the size of the entry boxes. Some entries may be one character, others a long phrase. (The maximum length for a field is 250 characters.) She saves the database under the name SG 1988, and is now ready to enter data about members.

In Ko-Ko's words, "The task of filling up the blanks" is now Clarke's next job. After inserting the last name of a member in the first field, she hits the tab key. The name is entered in the databases, and immediately the insertion point appears in the next field. Quickly she enters data in each field, moving from one to another by use of the tab key. (Other key commands, as well as use of the mouse, facilitate entry of data and different movements.)

When she has completed the last field for one record, she can press either the return or tab key. A new record is displayed, and she begins entering data for another member.

The database permits you to correct or change data in fields easily, and as you work with the database you can add or delete fields or change their positions in the form window. Figure 1 shows the form window for the database with information about one member.

The Membership List

To show information about several members at one time, Clarke uses the Show List command from the Format menu, and a list window appears. Clicking the horizontal scroll bar, she can view member information that is off the screen; with the vertical scroll bar, she can scan the entire list.

To get as much information on the screen as possible, Clarke rearranges the width of the individual fields by using the mouse. She positions the pointer on the right edge of a field name box at the top of the screen and drags to the left. In this way, she can make additional data visible on the screen (Figure 2).

At times Clarke or Ransome may wish to examine fields or records not visible on the screen because of its limited size. To answer this need,

UNIVERSITY OF QUEENSLAND LIBRARY

USING THE OXFORD GUIDE TO STYLE WITH ENDNOTE 6.0

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| 1. Introduction |
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1. INTRODUCTION

1.1 About this Guide

This guide aims to teach you practical techniques for using the *Oxford Guide to Style* with version 6.0 of EndNote. The *Oxford Guide to Style* contains provisions for various types of styles. This guide and the corresponding EndNote output styles follow the provisions for the use of footnotes/endnotes, with or without a bibliography at the end of the document.

The *Oxford Guide to Style* provides detailed but sometimes highly idiosyncratic instructions for referencing. It often suggests various ways of dealing with the one situation, and examples given in one section of the *Oxford Guide* may contradict instructions given elsewhere. The EndNote software cannot meet some of the requirements of the Oxford Guide. For all these reasons, our EndNote output styles and the following instructions are a compromise which should produce formatted papers in a style very similar to the provisions of the *Oxford Guide to Style*.

We assume that you have a basic familiarity with EndNote 6.0. If you have not yet familiarised yourself with EndNote, work through the **EndNote Guided Tour** in Chapter 3 of the EndNote manual. The manual forms part of the software and will be installed on your computer when you install EndNote. The default location is:
C:\Program Files\EndNote\EndNote6.pdf

You should also have access to a copy of the *Oxford Guide to Style*. Chapter 15 ('References and Notes') is the relevant section.

This guide is written for users of EndNote 6.0. Users of EndNote 4 and 5 will also find this guide useful. Bear in mind that some of the procedures for using EndNote 4 with Microsoft Word are different, but the end result should be the same.

This guide explains how to use EndNote 6.0 with Microsoft Word (Word 97 and above). EndNote 6.0 can also be used with Word Perfect (versions 9 and above), although the procedures are a little different.

This guide refers to the Windows version of the EndNote software. The information is also relevant to **Macintosh** users, with only minor variations.

1.2 Terminology

The following terms are used in this guide:

"OGS" – Ritter, R.M. *The Oxford Guide to Style* (Oxford: Oxford University Press, 2002)

"the output style" – the EndNote output style for the Oxford Guide to Style which can be downloaded from the University of Queensland Library website (see 1.3 below).

"the EndNote manual" – the manual for the EndNote software (see 1.1 above).

1.3 Downloading the Output Style

The EndNote output style to be used with this guide can be downloaded from the University of Queensland Library website at:

<http://www.library.uq.edu.au/endnote/styles.html>

Note that there are two versions of the style:

- **Footnotes Only** Use this version for writing short documents, e.g. journal articles
- **Footnotes plus Bibliography** Use this version for writing longer works which require a bibliography at the end, e.g. theses and books.

Follow the instructions on the webpage to download one or both versions of the style. **Macintosh** users should read the note on the webpage about making compatible copies of the styles.

Once you have downloaded the style, mark it as one of your favourites. To do this, go to EndNote, and click on **Edit** on the menu bar. Then click on **Output Styles>Open Style Manager**. This will display all the styles in your Styles folder. Find the Oxford Style

output style which you downloaded, and check the box beside it. Close the Style Manager by clicking on the X button in the top right-hand corner of the Style Manager window.

1.4 Displaying the EndNote Toolbars

We recommend that you use the EndNote toolbars, which give faster access to common functions. In this guide, we shall be referring to these toolbars.

To display the toolbars in EndNote, click on **Tools** on the menu bar. Then click on **Show Toolbar** and check **Main** and **Text Style**. The third option (**CWYW / Add-in**) will be greyed out at the moment. This toolbar will be displayed at the end of the **Text Style** toolbar when you begin to work with Microsoft Word.

2. SETTING UP CUSTOM REFERENCE TYPES

2.1 Why Use Custom Reference Types?

The EndNote software was originally created for use in scientific disciplines. It has gradually developed the ability to support referencing styles used in the humanities, but it still has some deficiencies in this area.

The output style is configured to use two custom reference types:

- **Edited Text** This reference type is to be used for books that have **both an author and an editor**, e.g. *The complete works of William Wordsworth*, edited by Charles Stevenson.
- **Book Excerpt** This reference type is to be used for a section from an **authored book**, e.g. 'Lady Windermere's Fan' in *Four Plays by Oscar Wilde*. The standard reference type called Book Section is used for a section from an edited book.

If you cite such works in your references, then you should set up these custom reference types before entering references in your library.

2.2 How to Set Up the *Edited Text* Reference Type

In EndNote, click on **Edit** on the menu bar. Then click on **Preferences**. When the **EndNote Preferences** window opens, click on **Reference Types** in the left-hand column. On the right-hand side of the window, click on the **Modify Reference Types** button.

This will open the **Edit Reference Types** window. Scroll to the right until you come to the **Unused** reference types. We will use two of these to create our custom reference types. Alternatively, you can select two of the standard reference types which you never use (such as Patent or Computer Program) and modify them.

You must follow the instructions *exactly* as given below, otherwise the output style will not recognise your custom reference type.

In the box at the top of the **Unused 1** column (or whichever column you plan to use), delete Unused 1 and type **Edited Text**. In the rows below, you must insert field names which correspond to the appropriate field in the **Generic** column. You will have to scroll down the window to see all the rows. The result should look exactly like **Figure 1**.

Once you have entered the fields shown in Figure 1, you can enter additional fields for your own use. Bear in mind that the output style will ignore any data entered in such fields.

2.3 How to Set Up the *Book Excerpt* Reference Type

Follow the same procedure to set up a reference type for Book Excerpt. In the box at the top of the **Unused 2** column (or whichever column you plan to use), delete Unused 2 and type **Book Excerpt**. In the rows below, you must insert field names which correspond to the appropriate field in the **Generic** column. You will have to scroll down the window to see all the rows. The result should look exactly like **Figure 1**.

Once you have entered the fields shown in Figure 1, you can enter additional fields for your own use. Bear in mind that the output style will ignore any data entered in such fields.

Click on the **OK** button to confirm these changes.

This will return you to the EndNote Preferences window. Click on the **OK** button to close this window.

Generic	Edited Text	Book Excerpt	Unused 3
Author	Author	Author	
Year	Year	Year	
Title	Title	Excerpt Title	
Secondary Author	Editor	Editor	
Secondary Title	Series Title	Book Title	
Place Published	City	City	
Publisher	Publisher	Publisher	
Volume	Volume	Volume	
Number of Volumes	Number of Volumes		
Number			
Pages	Number of Pages	Pages	
Section			
Tertiary Author			
Tertiary Title		Series Title	

Edition	Edition	Edition	
Date			
Type of Work			
Subsidiary Author	Translator	Translator	
Short Title	Short Title	Short Title	
Alternate Title			
ISBN/ISSN	ISBN	ISBN	
Original Publication	Original Publication	Original Publication	
Reprint Edition	Reprint Edition	Reprint Edition	
Reviewed Item			
Custom 1			
Custom 2			
Custom 3			
Custom 4			
Custom 5			
Custom 6			
Accession Number			
Call Number	Call Number	Call Number	
Label	Label	Label	
Keywords	Keywords	Keywords	
Abstract	Abstract	Abstract	
Notes	Notes	Notes	
URL	URL	URL	
Author Address			
Image			
Caption			

Figure 1: The *Edited Text* and *Book Excerpt* Reference Types

3. ENTERING DATA INTO YOUR LIBRARY

3.1 "Garbage In, Garbage Out"

For the output style to format your references correctly, the data must be entered correctly in your EndNote library. The following sections explain how to do this. Every reference type supported by the output style is listed below, in alphabetical order. Under each reference type, every field supported by the output style is listed, with instructions on how to enter data in that field.

The fields listed below are the only fields supported by the output style. You can enter data in other fields, but the output style will not format that data.

If you insert into your paper a reference with a reference type other than those listed below, the output style will insert the author's name in the footnote or bibliography, followed by a note: *Reference type not supported*. In such cases, you must edit the templates in the output style to create a template for the reference type in question. Alternatively, you can change the reference type to one of those listed below.

When you open a **New Reference** window so that you can insert data, the default reference type is Journal Article. If you are entering many references which are not journal articles, you can save time by changing the default reference type. To do this, click on **Edit** on the menu bar. Then click on **Preferences**. When the Preferences window opens, select **Reference Types** in the left-hand frame. You will now be able to change the Default Reference Type using the drop-down menu on the right-hand side.

3.2 Audiovisual Material

(OGS p. 542-545)

If audiovisual items are a major component of your references, you may find that you need to set up custom reference types to cater for the level of detail that you require. In that case, you will also have to amend the output style so that it formats your custom reference types.

The output style is not configured to format EndNote's Film and Broadcast reference type. We recommend that you use the Audiovisual Material reference type for films and broadcast material. Alternatively, you can amend the output style so that it formats the Film and Broadcast reference type.

3.2.1 Author

See 3.3.1

There may be several persons or organizations responsible for the work. Decide which name(s) to enter in the Author field, "depending on the focus of the work in which the reference appears, or the element the reader is most likely to search for" (OGS p. 542).

3.2.2 Year

See 3.3.2

3.2.3 Title

See 3.3.3

3.2.4 City

See 3.3.5

Enter the location of the distributor or producer of commercially published items. In the case of television or radio programmes, enter the location of the station from which they were broadcast.

3.2.5 Publisher

Enter the name of the distributor or producer of commercially published items. In the case of television or radio programmes, enter the name of the station from which they were broadcast.

3.2.6 Number

If the item has a publisher's catalogue number, enter it here.

3.2.7 Date

For television or radio programmes, enter the day and month of the broadcast. Do *not* include the year, as this should be entered in the Year field. Abbreviate names of months (e.g. Feb.), but do not abbreviate May, June, July. Examples: 23 June, 8 Sept.

3.2.8 Type

Enter a term to describe the type of material, e.g. DVD, compact disc, videocassette, audiocassette, kit.

3.2.9 Short Title

See 3.3.11

3.2.10 Label

See 3.3.14

3.3 Book

(OGS p. 506-525)

3.3.1 Author

(OGS p. 506-509)

Enter the full name, as given in the publication. Do not use initials for forenames, unless the author does so.

It is preferable to enter the family name first, followed by a comma and the forenames, e.g.

De La Mare, Walter

If there is more than one author, enter each author on a *separate line*. We recommend that you enter the names of all authors, as some other bibliographic styles require that all authors be listed. If there are more than three authors, the output style will just list the first author, followed by 'et al'.

If the work is anonymous and the author is unknown, leave the Author field blank.

"In the absence of an author or editor, an organization acting in the role of author can be treated as such" (OGS p. 523). Remember that EndNote requires that all names of corporate authors should be *followed by a comma*. Example:

Amnesty International,

The final comma will not appear in the formatted reference unless required.

However, if there is a comma within the corporate name, the comma should be duplicated, and no final comma is required. Example:

American Association for Health,, Physical Education and Recreation

The redundant comma will not appear in the formatted reference.

3.3.2 Year

(OGS p. 521-522)

When no date can be found, enter

n.d.

If the work is still in preparation, enter some appropriate term, e.g.

forthcoming

in press

For multi-volume works published over a period of time, enter the span of years, e.g.

1950-66

For multi-volume works still in the process of publication, enter an open-ended date, e.g.

1959-

For reprints, see 3.3.13

3.3.3 Title

(OGS p. 509-513)

Capitalize the first word and all significant words, but capitalize foreign titles following the rules of the language. The output style will not change the capitalization of the titles. Insert a colon between the main title and the subtitle.

When the title includes the title of another work, enclose the second title in single quotation marks. Do not italicise the second title. Example:

A Study Guide to 'Wuthering Heights'

3.3.4 Series Title

(OGS p. 517-518)

The Series Title field is optional. As a general rule, it should only be used when the book is published in a numbered series. In this case, add the number in Arabic at the end of this field, e.g.

ARCA Classical and Medieval Texts, 8

Note that the Series Title field is capitalized in the same way as the Title field.

3.3.5 City

(OGS p. 518-520)

Give the place of publication in its English form. Enter only the first named city of publication. Where no place of publication is given, enter

n.p.

3.3.6 Publisher

(OGS p.520-521)

Enter the first-named publisher using the shortest intelligible form of name.

For reprints, see 3.3.13

3.3.7 Volume

(OGS p. 516-517)

With multi-volume works, you have two options:

- create a single reference for the whole multi-volume work, in which case you should leave the Volume field blank and complete the Number of Volumes field (see 3.3.8).
- create a reference for each volume, in which case you should complete the Volume field in each reference and leave the Number of Volumes field blank.

If you are creating a reference for a particular volume of a multi-volume set, enter the volume number in the Volume field in lower case Roman numerals, e.g. ii

If the volume has a specific title of its own, this should follow the Roman numeral, e.g.
xii: The Nineteenth Century

3.3.8 Number of Volumes

(OGS p. 516-517)

See the note on the Volume field (3.3.7).

If you are creating a reference for a complete multi-volume set, enter the number of volumes in Arabic in the Number of Volumes field. Do not add the word "vols." as the output style will supply this.

3.3.9 Edition

(OGS p. 513-514)

Complete this field if the edition cited is not the first. Enter the ordinal number only (e.g. 2nd) or other required text (e.g. rev., new). The output style will supply "edn."

3.3.10 Translator

(OGS p. 509)

Enter the names of the translator(s) in this field, in the same way as you would enter data in the Author field (see 3.3.1).

The output style will provide the abbreviation "trans." before the translator's name.

3.3.11 Short Title

(OGS p. 564-565)

This field is only required if the reference is cited more than once in your document. See section 4.4 below.

3.3.12 Original Publication

(OGS p. 514)

If you wish to indicate that a book was originally published under a different title, enter the full details in this field. The output style will include this data in your reference, without further formatting, so you must italicise the title and supply all necessary punctuation, e.g.

first published as *When the Wind Blows*, 1949

3.3.13 Reprint Edition

(OGS p. 514-515)

If the details in the EndNote reference refer to the original edition, you can note details of a reprint in this field. The output style will supply the abbreviation "repr." before the contents of this field. You must enter the details exactly as they should appear in the formatted reference. For example:

1974

New York: Haskell House, 1970

It is acceptable to leave the City and Publisher fields blank and insert the original year of publication in the Year field. Then enter the full publishing details of the reprint edition in the Reprint Edition field. When the output style formats such a reference, the publishing details will appear as:

(1905; repr. New York: Dover Publications, 1964)

3.3.14 Label

This field can be used to insert a term which will determine how the references are sorted in the bibliography at the end of your document (if you are using the version of the output style which is configured to provide footnotes plus bibliography). For more details, see section 5.1 below.

This field must not be used for any other purpose, as that would affect the sorting of the bibliography. Alternatively, you can amend the output style so that it does not sort the bibliography using the Label field.

3.4 Book Excerpt

(OGS p. 525-26)

This is a custom reference type which you must set up (see 2.3). Use this reference type for a section from an **authored book**, e.g. one play, poem, story, chapter or essay from a collection of texts which were all written by the same author. The standard reference type called Book Section (see 3.5) is used for a section from an edited book, e.g. a paper in a volume of conference proceedings or an essay in a collection of essays by different authors.

3.4.1 Author

See 3.3.1

The author of the excerpt should be the same as the author of the whole book.

3.4.2 Year

See 3.3.2

3.4.3 Excerpt Title

Enter the title of the individual play, poem, story, essay, chapter, etc. Capitalize following the normal rules for capitalization of titles.

3.4.4 Editor

If the book has an editor (or editors) in addition to the author, enter the name(s) here. Enter the data in the same way as you would enter names in the Author field (see 3.3.1). Do not add "(ed.)" or "(eds.)" The output style will supply this.

3.4.5 Book Title

Enter the title of the whole work. See 3.3.3.

3.4.6 City

See 3.3.5

3.4.7 Publisher

See 3.3.6

3.4.8 Volume

If the excerpt is from a multi-volume set, enter the number of the volume in which the section appears. See 3.3.7.

3.4.9 Pages

Enter the first and last pages, e.g. 347-64

3.4.10 Series Title

See 3.3.4

3.4.11 Edition

See 3.3.9

3.4.12 Translator

See 3.3.10

3.4.13 Short Title

See 3.3.11

3.4.14 Original Publication

If you wish to note that the excerpt was originally published elsewhere, enter the details of the original source in this field. The output style will not re-format this data in any

way, so you must italicise any titles and provide any other text and punctuation yourself, e.g.

from *Oxford Studies in Ancient Philosophy*, 1 (1983), 1-25
first published 1976

3.4.15 Reprint Edition

See 3.3.13

3.4.16 Label

See 3.3.14

3.5 Book Section

(OGS p. 525-526)

Use this reference type for a section from an **edited book**, e.g. a paper in a volume of conference proceedings or an essay in a collection of essays by different authors. Use the Book Excerpt reference type (see 3.4) for a section from an authored book, e.g. one play, poem, story, chapter or essay from a collection of texts which were all written by the same author.

3.5.1 Author

See 3.3.1

3.5.2 Year

See 3.3.2

3.5.3 Title

Enter the title of the section. Capitalize following the normal rules for capitalization of titles.

3.5.4 Editor

Enter the data in the same way as you would enter names in the Author field (see 3.3.1). Do not add "(ed.)" or "(eds.)" The output style will supply this.

3.5.5 Book Title

See 3.3.3

3.5.6 City

See 3.3.5

3.5.7 Publisher

See 3.3.6

3.5.8 Volume

If the section is from a multi-volume set, enter the number of the volume in which the section appears. See 3.3.7.

3.5.9 Pages

Enter the first and last pages, e.g. 347-64

3.5.10 Series Title

See 3.3.4

3.5.11 Edition

See 3.3.9

3.5.12 Translator

See 3.3.10

3.5.13 Short Title

See 3.3.11

3.5.14 Original Publication

If you wish to note that the section was originally published elsewhere, enter the details of the original source in this field. The output style will not re-format this data in any way, so you must italicise any titles and provide any other text and punctuation yourself, e.g.

from *Oxford Studies in Ancient Philosophy*, 1 (1983), 1-25
first published 1976

3.5.15 Reprint Edition

See 3.3.13

3.5.16 Label

See 3.3.14

3.6 Conference Proceedings

(OGS p. 532-533)

Use this reference type only for *unpublished* conference papers. A published conference paper should be entered with the Book Section or Journal Article reference type, as appropriate. A published volume of conference proceedings should be entered with the Edited Book reference type.

3.6.1 Author

See 3.3.1

3.6.2 Year of Conference

Enter the year in which the conference was held (if known).

3.6.3 Title

Enter the title of the paper. Follow the normal rules for capitalization of titles (see 3.3.3).

3.6.4 Conference Name

Enter the full name of the conference, without any initial article, e.g.

Third Annual Meeting of the International Society for Medieval Studies

3.6.5 Conference Location

Enter the name of the place(s) where the conference was held.

3.6.6 Date

Enter the day(s) and month when the conference was held (if known). Do *not* include the year, as this should be entered in the Year of Conference field. It is acceptable to abbreviate names of months (e.g. Feb.), but do not abbreviate May, June, July. Examples: 4-7 Nov., 14 Feb.

3.6.7 Short Title

See 3.3.11

3.6.8 Label

See 3.3.14

3.7 Edited Book

This reference type should be used for a collection of documents, essays, congress reports, etc. which have been prepared for publication by an editor. If you are creating a reference for an edition of a text, use the Edited Text reference type (see 3.8).

The supported fields are identical with those of the Book reference type (see 3.3), except that the Editor field replaces the Author field and the Translator field is not supported.

When entering data in the Editor field, do not add "(ed.)" or "(eds.)". The output style will supply this.

3.8 Edited Text

(OGS p. 522)

This is a custom reference type which you must set up (see 2.2). Use this reference type for books which have both an author and an editor, e.g. *The complete works of William Wordsworth*, edited by Charles Stevenson.

For textual editions in which texts by various authors have been gathered together by the editor (e.g. *Latin Love Lyrics*, edited by D. L. Page), use the Edited Book reference type.

The supported fields are identical with those of the Book reference type (see 3.3), except for the addition of the Editor field. When entering data in the Editor field, do not add "(ed.)" or "(eds.)". The output style will supply this.

3.9 Electronic Source

(OGS p. 545-553)

"A number of approaches exist to citing sources held as electronic data ... fundamentally any sensible and consistent approach is admissible if it offers enough information about the source to access or retrieve it" (OGS p. 545).

For journal articles which are also available in printed form, see the note under the Journal Article reference type (3.10).

3.9.1 Author

If the resource has an obvious personal author, enter the details here. A corporate body acting as author might be better entered in the Producer field (3.9.4).

3.9.2 Year

Enter the year created, published or posted. If the resource has been updated, enter the year of the latest update. When no year can be found, enter

n.d.

3.9.3 Title

See 3.3.3

3.9.4 Producer

This field can be used for:

- The publisher of published items such as CD-ROMs. Give the place (if known) and the publisher, e.g. New York: Oxford University Press
- The title, volume and issue number of an electronic journal, e.g. *Information Today*, 18/5. The title of the journal should be in italics. To do this, highlight the title, click on **Edit** on the menu bar, and then click **Style** and **Italic**. Alternatively, highlight the title and use the standard **Ctrl+I** shortcut.
- The name of a larger website on which the cited webpage resides, for example, the name of the organisation responsible for the website.

3.9.5 Access Year

Enter the year in which you accessed the resource.

3.9.6 Access Date

Enter the day and month on which you accessed the resource. Do *not* include the year, as this should be entered in the Access Year field. It is acceptable to abbreviate names of months (e.g. Feb.), but do not abbreviate May, June, July. Examples: 23 June, 8 Sept.

3.9.7 Edition

If appropriate, enter the edition details in full, e.g. 2nd edn., version 6.0.

3.9.8 Last Update Date

If appropriate, enter the day and month on which the site was last updated. Do *not* include the year, as this should be entered in the Year field. It is acceptable to abbreviate names of months (e.g. Feb.), but do not abbreviate May, June, July. Examples: 23 June, 8 Sept.

3.9.9 Type of Medium

Enter an appropriate term, e.g. online journal, online text, website, newsgroup article, email discussion list, CD-ROM.

3.9.10 Short Title

See 3.3.11

3.9.11 Label

See 3.3.14

3.9.12 URL

For an Internet resource, enter the URL here. If the URL is very long, it is acceptable to give the URL of the home page of the site on which the specific page is located.

3.10 Journal Article

(OGS p. 527-530)

If the article is available in printed form, but you have accessed it electronically, you have two options:

- Cite the article as if you had used the printed form. This is often the easiest solution, but it may create problems if you wish to refer to particular pages. Many electronic journals do not indicate where pages begin and end in the printed version.
- Cite the electronic version. In this case you must use the Electronic Source reference type (see 3.9).

3.10.1 Author

See 3.3.1

3.10.2 Year

See 3.3.2

3.10.3 Title

Enter the title of the article. Follow the normal rules for capitalization of titles (see 3.3.3).

If the article is a review and the review has no specific title of its own, leave this field blank. Enter details in the Reviewed Item field (see 3.10.9).

3.10.4 Journal

Follow the normal procedure for capitalization of titles (see 3.3.3).

Omit the definite or indefinite article at the beginning of a journal title.

It is generally good practice to use full journal titles in references, so we recommend that you enter the full journal title in the Journal field. However if you always abbreviate journal titles when writing, then you can enter abbreviated titles in the Journal field.

A better way of handling journal abbreviations is to enter the full title in the Journal field and set up a journals term list to store the abbreviations. If you wish to use the abbreviated version in your document, you must edit the "Journal Names" section of the output style so that it takes journal titles from the appropriate column of your journals term list.

3.10.5 Volume

Enter the number in Arabic numerals, without "volume" or "vol.", e.g. 38

If the journal only has issue numbers (e.g. Number 48) without volume numbers, treat the issue number as a volume number and enter it in the Volume field. Just enter the number, e.g. 48

If each issue of the journal begins at page 1, and the journal has no issue numbers but identifies each issue only by date of publication (e.g. December 1972, Spring 1996), use the Magazine Article reference type (see 3.11).

A series designation can be inserted before the volume number, e.g. 6th ser. 15

3.10.6 Issue

Enter the issue number only if each issue of the journal begins at page 1. Where page numbering is continuous across the issues of a volume, leave the Issue field blank. If entering an issue number, enter it in Arabic numerals, without "number" or "no.", e.g. 4

If the journal only has issue numbers (e.g. Number 48) without volume numbers, treat the issue number as a volume number and enter it in the Volume field (see 3.10.5)

3.10.7 Pages

Enter the first and last pages, e.g. 347-64

3.10.8 Short Title

See 3.3.11

3.10.9 Reviewed Item

If the article is a review, enter details of the reviewed item in this field, in the format: Author, Title (Place of Publication, Year). Example:

Gerald L. Geison, *The Private Science of Louis Pasteur* (Princeton, 1995)

EndNote will not reformat this data, so it must be entered exactly as required. To italicise the title of the reviewed item, highlight the title, click on **Edit** on the menu bar and then select **Style** and **Italic**. (Alternatively, highlight the title and use the standard **Ctrl+I** shortcut.)

3.10.10 Label

See 3.3.14

3.11 Magazine Article

Use this reference type *only* for journal articles where each issue of the journal begins at page 1, and the journal has no issue numbers but identifies each issue only by date of publication (e.g. December 1972, Spring 1996, 14-20 August 1983).

3.11.1 Author

See 3.3.1

3.11.2 Year

See 3.3.2

3.11.3 Title

See 3.10.3

3.11.4 Magazine

See 3.10.4

3.11.5 Pages

Enter the first and last pages, e.g. 347-64

3.11.6 Date

Enter the day, month, season or other designation. Do *not* include the year, as this should be entered in the Year field. It is acceptable to abbreviate names of months (e.g. Feb.), but do not abbreviate May, June, July.

3.11.7 Short Title

See 3.3.11

3.11.8 Reviewed Item

See 3.10.9

3.11.9 Label

See 3.3.14

3.12 Manuscript

(OGS p. 535-538)

Use this reference type for manuscript and archival material.

3.12.1 Author

See 3.3.1

3.12.2 Year

See 3.3.2

3.12.3 Title

If the work has a title of its own, enter it here. Otherwise enter some descriptive phrase, e.g. Letter to Vance Palmer; Account Books; Outgoing Correspondence.

Follow the normal rules for capitalization of titles (see 3.3.3).

3.12.4 Collection Title

Enter the name of the repository, and of any special collection within that repository, e.g.

Fryer Library, University of Queensland

National Library of Australia, Clunies Ross Collection

If you wish to abbreviate the name of the repository or collection, then you should do so consistently and ensure that the abbreviation is recorded in a list of abbreviations in your document.

3.12.5 City

Enter the location of the collection if this is not already obvious from the data in the Collection Title field.

3.12.6 Number

Enter the shelf number or other identification number used by the institution which holds the item. Do not use abbreviations, except those used by the institution itself.

3.12.7 Date

If appropriate, enter the day and month. Do *not* include the year, as this should be entered in the Year field. It is acceptable to abbreviate names of months (e.g. Feb.), but do not abbreviate May, June, July. Examples: 23 June, 8 Sept.

3.12.8 Short Title

See 3.3.11

3.12.9 Label

See 3.3.14.

3.13 Newspaper Article

(OGS p. 528)

3.13.1 Reporter

Follow the normal procedure for entering author names (see 3.3.1).

If the article is unattributed, leave this field blank.

3.13.2 Year

See 3.3.2

3.13.3 Title

See 3.10.3

3.13.4 Newspaper

Follow the normal procedure for the capitalization of titles (see 3.3.3). OGS advises that you drop the definite or indefinite article at the beginning of the title. However some examples in OGS retain the article, e.g. The Times

3.13.5 City

If necessary for the identification of the newspaper, add the name of the city where it is published.

3.13.6 Pages

"Page and column numbers for newspaper articles can be included, though they need not, since they may differ between issues" (OGS p. 528). Enter the page number, without any abbreviation before it. If you wish to record the column as well, enter this after the page number as follows: 7, cols. 2-3

3.13.7 Section

If there are separately paginated sections, enter the section details in full, e.g. section 2, Review, Business.

3.13.8 Issue Date

Enter the day and month. Do *not* include the year, as this should be entered in the Year field. It is acceptable to abbreviate names of months (e.g. Feb.), but do not abbreviate May, June, July. Examples: 23 June, 8 Sept.

3.13.9 Short Title

See 3.3.11

3.13.10 Reviewed Item

See 3.10.9

3.13.11 Label

See 3.3.14

3.14 Thesis

(OGS p. 531-532)

For a thesis which has been published, use the Book reference type.

3.14.1 Author

See 3.3.1

3.14.2 Year

See 3.3.2

3.14.3 Title

See 3.3.3

3.14.4 University

Give the university name in full, without abbreviation.

3.14.5 Thesis Type

Enter the standard abbreviation for the degree, followed by the word "thesis" or "dissertation", as appropriate. For "dissertation" the abbreviation "diss." may be used. For theses from non-English speaking countries, a general term like "doctoral thesis" may be used. Examples: Ph.D. diss., Ph.D. thesis, D.Phil. thesis, MA thesis.

3.14.6 Short Title

See 3.3.11

3.14.7 Label

See 3.3.14

4. INSERTING REFERENCES INTO YOUR DOCUMENT

We now look at some practical issues that arise when you use EndNote in conjunction with your word-processor. These instructions apply to recent versions of Microsoft Word for Windows.

4.1 The EndNote Toolbar

When working with EndNote 6 in Word, we recommend that you use the EndNote toolbar. To display the toolbar, click on **View** on the Word menu bar, then click on **Toolbars**, and select **EndNote 6**.

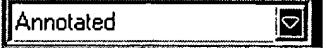
The buttons on the toolbar will be unfamiliar at first. Sit your mouse on each of the buttons, and a text box will appear explaining the use of that button. You can also access these commands by clicking on **Tools** on the Word menu bar, and then clicking on **EndNote 6** to display the EndNote submenu. However the toolbar gives you quicker access to the EndNote functions.

4.2 Inserting References in Footnotes

Notes can be inserted at the foot of the page to which they refer (footnotes) or gathered at the end of the chapter or at the end of the work (endnotes). The instructions below refer to footnotes, but Word gives you the option of using endnotes if you prefer.

The footnote/endnote numbers should be inserted as superscript Arabic numbers outside punctuation, but inside a closing bracket when referring solely to matter within the

brackets. Normally the superscript numbers are inserted at the end of a sentence, unless referring only to part of the sentence (OGS p. 557).

First you must tell EndNote which style you wish to use. Click on the **Go to EndNote** button  on the EndNote toolbar in Word. This will take you to EndNote, where you should go to the style menu  Annotated  on the main EndNote toolbar and click on the arrow. Click on **Select Another Style** to open the complete list of styles. Browse through the list to find the version of the *Oxford Style* which you have already downloaded (see 1.3 above) and choose it.

At the end of the main toolbar in EndNote, you should now see three extra buttons .

These are the **Cite While You Write toolbar**, and they become visible once you are using EndNote in conjunction with Word. Click on the **Return to Word Processor** button  and you will be returned to your Word document.

Position your cursor at the appropriate place in the Word document. Click on **Insert** on the menu bar in Word, and then select **Footnote**. When the dialog box opens, select the **Footnote** and **AutoNumber** options.

Word will create the footnote at the bottom of the screen. If you wish to insert some text before the reference, type it first, and then make a space.

To insert the reference, you can use the **Find Citation(s)**  button on the EndNote toolbar in Word to search your EndNote library and insert the reference.

Alternatively, you can use the **Go to EndNote**  button on the toolbar and display your complete EndNote library. Highlight the reference which you wish to cite, and then click  on the Insert Citation button  on the toolbar in EndNote.

Once you have inserted the reference, EndNote will instantly format the reference using the selected style. If you wish to cite a second reference immediately afterwards, follow the same procedure. The output style will insert a semicolon between the two references.

After you have inserted the reference in the footnote, you can of course type further text in the footnote. You can also insert further references using EndNote. Remember that you must *insert a full stop at the end of every footnote*.

If you wish to add a pinpoint citation for a specific page, chapter, etc. at the end of your reference, see section 4.3 below.

Figure 2 shows how a footnote might appear after formatting.

⁴ See, e.g., Sydney Shoemaker and Richard Swinburne, *Personal Identity: Great Debates in Philosophy* (Oxford: Blackwell, 1984) 127; Peter Unger, *Identity, Consciousness and Value* (Oxford: OUP, 1990) 11.

Figure 2: Formatted Footnote with Multiple References and Pinpoint Citations

4.3 Pinpoint Citations

After EndNote has inserted the reference into the footnote, you can add a pinpoint citation to specific pages or sections.

Highlight the reference in the footnote. Click on the **Edit Citation(s)** button  on the EndNote toolbar in Word. This will open the **EndNote Edit Citation** window. If the footnote contains more than one reference, go to the **Citations** box and highlight the required citation. Now enter the page number in the **Pages** box, e.g. 332. Click on the **OK** button.

The reference in the footnote will be reformatted and the page number will be inserted at the end. The page number will appear as "332" for reference types which do not already include page numbers (e.g. Book) but it will appear as "at 332" for reference types which already include page numbers (e.g. Journal Article).

If the pinpoint citation includes a volume number, use the same procedure and enter all the data in the **Pages** box. The volume number should be entered in Roman numerals, followed by a full stop and the page number in Arabic numerals, e.g. v. 101

The **Pages** box can be used for a wide range of pinpoint references, e.g. app. A, introduction, para. 3, esp. 107-109

4.4 Repeat Citations

When a reference is duplicated in the immediately following note, EndNote will insert the text "Ibid." If necessary, you can use the **Edit Citation(s)** command to add a specific page number to this reference, e.g. Ibid. 56.

In other repeated citations, EndNote will just insert the author and the short title, assuming that you have entered data in the Short Title field of your references. If the Short Title field is blank, EndNote will use the Title field. For this reason, you should insert a Short Title field in any reference that you cite more than once. The short title normally consists of the first words of the title, minus any initial article; for more details see OGS p. 564-565.

If necessary, you can use the **Edit Citation(s)** command to add a specific page number to the repeat citation, e.g. Martorell, *History of Cambodia* 103.

It is not essential to use EndNote to insert repeat citations. In some cases, it is easier to type all the data yourself, e.g. "Nozick has discussed this at length in his *Philosophical Explanations* 31."

4.5 Modifying Citations

When using an author/date style (e.g. Harvard style), EndNote allows you to modify the citations in your document in various ways, such as removing the author or year from the citation. Unfortunately, this is not possible with a footnote style.

For example, if you want your footnote to read "Richardson has discussed this in her *Elements of Philosophical Linguistics* (New York: Oxford University Press, 1995)", you will encounter problems when you use EndNote to insert the reference. The footnote will now read "Richardson has discussed this in her Jane Richardson, *Elements of Philosophical Linguistics* (New York: Oxford University Press, 1995)".

We suggest that you avoid this problem by rephrasing such footnotes, e.g. "This has been discussed in Jane Richardson, *Elements of Philosophical Linguistics* (New York: Oxford University Press, 1995)".

Alternatively, you can edit the citation to remove the author's name. If you wish to edit a citation which you have inserted using EndNote, it is best to wait until you have finished writing the document and have removed the field codes (see section 4.7 below).

4.6 Frequently Cited Texts

When you are making frequent references to a particular text (this applies particularly to literary works), you should only use EndNote to insert the first reference. You can add a note to state that subsequent references are to the text of this edition. For example, the footnote in **Figure 3** contains a complete reference with a pinpoint citation (inserted using EndNote), followed by a note explaining that subsequent references are to this edition.

¹ Wallace Stevens, *The Collected Poems* (New York: Viking, 1954) 56. All references are to the text of this edition.

Figure 3: First Citation for a Frequently Cited Work

Subsequent page, chapter or line references can be made in parentheses within the text of your document.

If you are making frequent reference to a number of texts, you may wish to use an abbreviation for each work. This should be made clear at the first citation. **Figure 4** shows an example of this, where EndNote has been used to insert the first citation, while subsequent citations have been inserted without using EndNote.

¹ See for example Michael Dummett, *Frege: Philosophy of Language* (2nd edn., Cambridge, MA: Harvard University Press, 1981), hereafter cited as *FPL*.

...

⁴ *FPL* 53.

Figure 4: Using an Abbreviation for a Frequently Cited Work

If you are making frequent reference to a newspaper or magazine, without giving full details of individual articles, it is best to insert such citations without using EndNote. If you want the newspaper or magazine to be listed in your bibliography, create a reference for it in your library, using the Book reference type. Enter the years of publication in the Year field, the title of the newspaper or magazine in the Title field, and the place of publication (if required) in the City field. You may also wish to insert a category in the Label field (see section 5.1 below). You can now insert this reference at the end of your document, so that it will appear in the bibliography – see the instructions in section 5.2.2 below.

4.7 Removing the Field Codes

The final step when using EndNote to format a document is to remove the field codes which link the document to EndNote. These field codes can interfere with the software used by publishers.

Open your document in Word. On the EndNote toolbar in Word, click on the Remove Field Codes button . You will see a message explaining that this command creates a new, unsaved document. Click **OK** to continue.

Save the new document under a name different from that of your original document. The *original document must be retained*, as it is your master copy. Any changes which require the insertion, amendment or deletion of references should be made in the master copy. You will then have to use the Remove Field Codes command again to generate a new unlinked document.

5. WORKING WITH LONG DOCUMENTS

If you are writing a longer work (e.g. a thesis or book), you will probably require a bibliography at the end of the work, in addition to the footnotes on each page (or the endnotes at the end of each chapter).

5.1 Categorising the References

"In general writers should refrain from subdividing bibliographies into categories or chapters: this renders them difficult to use, since the reader (or editor) must then be able to predict or recall accurately into which class or section a given work falls. There are two exceptions to this: a division into primary and secondary sources, and a separate list of manuscripts and documents." (OGS p. 559)

If you wish to divide your bibliography into categories, you must enter a category in the Label field of each of your references. The output style will sort your bibliography by the Label field, so that the references will be grouped in categories. Then references are sorted by the first author, or, if there is no author, by title. If you do not wish to divide your bibliography into categories, ensure that the Label field in your references is blank.

Decide on the categories which you wish to use, and assign a number to each, to determine the order in which the categories will appear in the bibliography, e.g.

1. Primary Sources
2. Secondary Literature

Archival and manuscript material is more difficult to manage. It is common to categorise such material by the location and repository name, so you may have to use a greater number of categories, e.g.

1. Canberra. National Archives of Australia
2. Canberra. National Library of Australia
3. London. Public Record Office
4. Melbourne. Victorian Public Record Office
5. Sydney. Mitchell Library
6. Published Sources

If you are adding the category as you enter each reference, we suggest that you set up a *term list* linked to the Label field. Store the list of categories in the term list. When you are entering a reference and reach the Label field, press **Ctrl+1** to open the term list. Double click on the appropriate category from the term list and EndNote will insert it in the Label field. For more information on working with term lists, see Chapter 9 of the EndNote manual.

Alternatively, you can add the category to the Label field of multiple references simultaneously by using EndNote's Change Field command. Open the library and highlight all references which belong to a particular category. Then click on **References**

on the menu bar and click **Show Selected References** to display only those references. Now click on **References** again and click **Change and Move Fields**. When the dialog box opens, make sure that the **Change Fields** tab is selected. Use the drop-down menu to select the **Label** field. Click the radio button for **Replace Whole Field With**, and type the required text in the box (for example, 2. Secondary Literature) and then click on the **OK** button.

When you use the *Footnotes plus Bibliography* version of the output style to generate the bibliography, the references will appear as a single block, grouped according to the categories. When doing the final editing of your document, insert some blank lines between each category and add an appropriate heading to each group.

5.2 Structuring Long Documents

Long documents can present problems for both Word and EndNote. We will look at three possible ways of structuring long documents.

5.2.1 Each Chapter as a Separate Document

Keep each chapter as a separate Word document. This procedure is somewhat cumbersome, but because the individual documents are not very large, you should avoid the problems which can occur with long documents.

Use the *Footnotes Only* version of the output style to format the references in each chapter.

Now create the bibliography as a separate Word document. Open your EndNote library. If the library contains only references which you wish to include in the bibliography, just press **Ctrl+A** to select all the references.

Alternatively, you may wish to include only selected references in your bibliography:

- If you have inserted some code into the required references while you were writing your paper (for example, XXX in the Notes field), you can **Search** for all references which contain that code. Then press **Ctrl+A** to select those references.
- If you have not coded the references, hold down the **Ctrl** key and go through the library, highlighting the required references. Then click on **References** on the menu bar and click **Show Selected**.

Once you have selected the references, click on the **Sort Library** button  on the toolbar. This will open a dialog box that allows you to select the fields on which to sort. In the first box, select **Label**. In the second box, select **First Author**. In the third box, select **# of Authors**. In the fourth box, select **Author**. In the fifth box, select **Title**. Then click on the **Sort** button and EndNote will re-sort the references.

Use the **Style Manager** menu  on the toolbar to select the *Footnotes plus Bibliography* version of the output style.

Click on the **Export** button  on the toolbar and a dialog box will open. Specify where you want to save the bibliography and give the file a name. In the **Save as Type** box, you must select **Rich Text Format**.

EndNote will format the bibliography and save it as the file which you have designated. Open this file in Word. The references should be grouped according to the categories which you inserted in the Label field (see 5.1 above). This document is not linked to EndNote and contains no field codes, so you can now change the font, separate out the categories and add an appropriate heading to each group.

5.2.2 One Large Document

Create one large Word document. Bear in mind that both EndNote and Word can encounter problems with very large documents.

At the beginning of each chapter, insert a Section break so that each chapter is a separate Section. When you insert your first footnote in a new chapter, display the footnote options and check the option **Restart Each Section**. Word will now begin numbering the footnotes at 1 in the new chapter.

Use the *Footnotes plus Bibliography* version of the output style to format the references.

You may want your bibliography to include some *references which you have not directly cited* in your document, or references which you have typed in yourself or copied-and-pasted from the reference in the library, without using EndNote to insert the reference in the footnote.

To make these references appear in the bibliography, insert a page break at the end of your document. On this new page, insert all the additional references, one after another. It is probably wiser to do this on a continuing basis as you are writing the document, but it can be done in one step once you have finished writing.

The instant formatting function will suppress these references from the text, but they will now appear in the bibliography. Although the references are not visible in the text, they are stored in the field codes and will remain there.

5.2.3 Master Document and Subdocuments

Set up the chapters as subdocuments within a master document. Use the help screens in Word if you are not familiar with this function. Bear in mind that some experienced Word users regard the Master Document / Subdocument function as unstable and unreliable.

Use the *Footnotes plus Bibliography* version of the output style to format the references. You may want your bibliography to include some references which you have not directly cited in your document, or references which you have typed in yourself or copied-and-pasted from the reference in the library, without using EndNote to insert the reference in the footnote. To make these references appear in the bibliography, follow the procedure outlined in 5.2.2 above.